

1 Jesus Soto (Special Needs Trust)

Case No. 11CEPR00718

Atty Pimentel, Paul J.

Atty Kruthers, Heather H

Status Hearing Re: Second Account

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> 2 ND Account filed 9-5-14 is set for hearing on 10-20-14
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
Reviewed by: skc		
Reviewed on: 9-9-14		
Updates:		
Recommendation:		
File 1 - Soto		

			The Jayden Davis-Maynard Special Needs Trust was established with Perine & Dicken Professional Fiduciaries as initial trustees with bond of \$650,232.16 on 7-2-13, subject to approval of the order.	NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> First account filed 9-10-14 is set for hearing on 10-23-14.
	Aff.Sub.Wit.		The Order signed 7-22-13 set this status hearing for the filing of the first accounting.	
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

DOD: 8-24-12		CAROLE GOULART , Daughter, was appointed Executor with Full IAEA without bond on 7-8-13. Letters issued on 7-9-13. Inventory and Appraisal filed 3-3-14 indicates a total estate value of \$1,850,310.00. Status Report filed 9-5-14 states more time is needed to sell the estate's undivided 1/6 interest in certain property in order to meet the administrative cash requirements of the estate, including tax debt and expenses of approx. \$54,500.00. The Executor will attempt to work out a deal with her uncles, who each own an interest in the property to either borrow against the estate's interest or possibly file a partition action to force a sale. Keeping the estate open over the near-term is not harmful to the estate or the beneficiaries and will allow Peittioner additional time to obtain income tax information to compile delinquent personal income taxes of the decedent and come up with a way to generate sufficient liquidity to enable the settlement and final distribution thereof. Petitioner requests an additional six months.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account.
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: skc			
Reviewed on: 9-9-14			
Updates:			
Recommendation:			
File 3 - Teixeira			

DOD: 02/26/13	SHAWN MURPHY , son, was appointed as Administrator with full IAEA and without bond on 07/11/13.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Inventory & Appraisal, Final, filed 02/28/14 - \$254,436.39	1. Need Account/Report of Administration and Petition for Final Distribution.
Aff.Sub.Wit.		
Verified	Inventory & Appraisal, Supplemental, filed 03/25/14- \$2,910.60	
Inventory		
PTC		
Not.Cred.	Status Report filed 09/02/14 states: the Administrator is a firefighter with the CA Dept. of Forestry and has been unable to complete a few remaining task to complete the administration of the estate. Once those remaining tasks are complete, a petition for final distribution will be filed.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 09/09/14
		Updates:
		Recommendation:
		File 4 - Murphy

DOD: 11/13/13	JOHN MCMURRAY , son, was appointed as Executor with full IAEA and without bond on 04/10/14.	NEEDS/PROBLEMS/COMMENTS: 1. Need Inventory & Appraisal and/or current written status report.
	ALVA HOLFORD , surviving spouse, filed a Spousal Property Petition on 07/11/14. The Petition was dismissed on 08/19/14 when no one appeared at the hearing. (Petition to Remove Personal Representative and Petition for Order for Issuance of Citation for Examination Regarding Property of the Estate were also dismissed due to no appearances).	
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory	x	
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 09/09/14
		Updates:
		Recommendation:
		File 5 - Holford

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 08/19/06	JACKIE MCDONALD , sister-in-law, was appointed as Executor with full IAEA and without bond on 10/23/06.	NEEDS/PROBLEMS/COMMENTS: 1. Need Accounting/Report of Executor and Petition for Final Distribution.
Cont. from	Inventory & Appraisal, Final, dated 01/17/07 - \$333,566.08	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 09/09/14
		Updates:
		Recommendation:
		File 6 - Wright